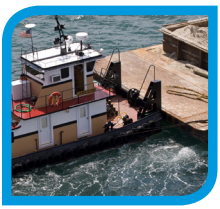
a pocket guide to

Florida Transportation Trends and Conditions

2013



The Mission of the Florida Department of Transportation is to provide a safe transportation system that ensures the mobility of people and goods, enhances economic prosperity and preserves the quality of our environment and communities.

This ***Pocket Guide to Florida Transportation Trends and Conditions*** is one of several products intended to assist Florida transportation policy makers and planning organizations by identifying, analyzing and disseminating information about how transportation serves and affects Florida. It is organized into four areas:

- The growing demand for transportation facilities and services;
- The current system or supply of transportation;
- The impacts of the transportation system on our society; and
- The resources, funding and costs associated with providing transportation.

We hope you find this publication helpful. Extensive additional information on trends and conditions regarding transportation in Florida is available at:

www.dot.state.fl.us/planning/trends

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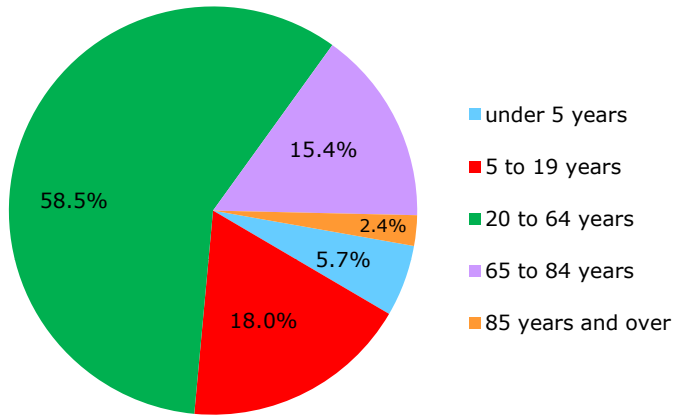
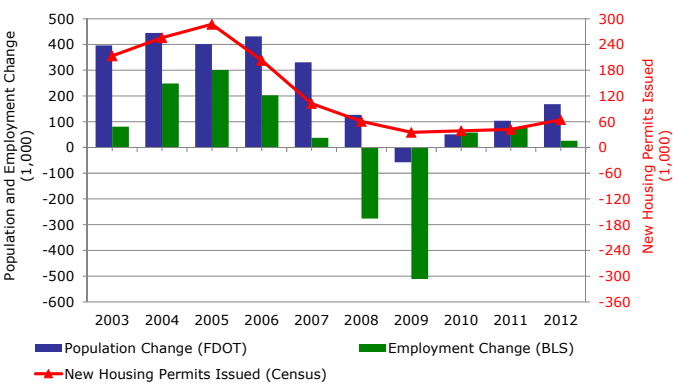
Population

2012 Population by Age



New Housing Permits Issued per Year and Annual Change in Population and Employment



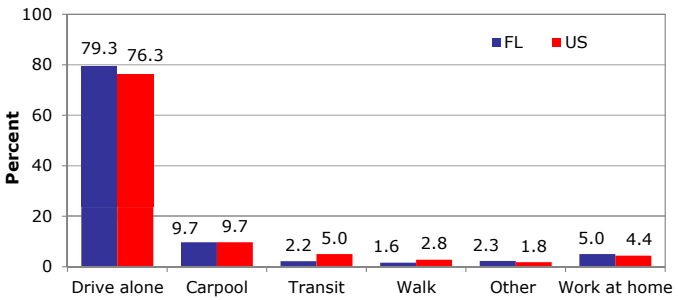
Population

- With over 19 million people, Florida remains the 4th largest state in the U.S., trailing New York by approximately a quarter million residents.
- From 2011 to 2012, Florida's population grew by over 169,000. Over 20% of this growth was natural growth with the remaining attributable to immigration and migration.
- Between 2001 and 2012, Florida's population increased 1.4% per year and about 16.8% overall.
- In 2012, Florida issued 64,810 new housing permits, nearly 53% above 2011.
- By 2040, over 24% of Florida's population is projected to be 65 and older, compared with 17.8% in 2012 and 14.6% in 1970.
- From 2011 to 2012, Sumter County had the highest growth (+3.7%) followed by Okaloosa County (+3.1%), Walton County (+2.7%), Osceola County (+2.6%), and Lee County (+2%).
- From 2011 to 2012, no significant changes were observed for the following counties: Hernando, Franklin, Nassau, Union and Baker. Eighteen counties experienced an overall loss with the greatest being Bradford (-5%), Hendry (-2%), and Gadsden (-1.5%).

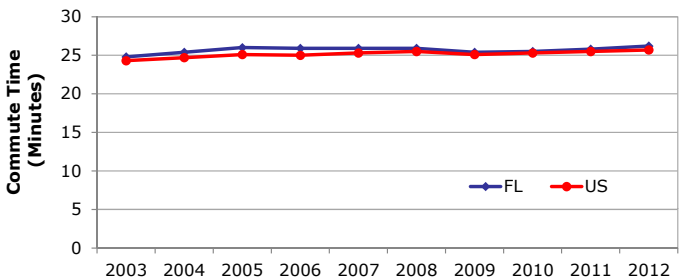
Sources: U.S. Census Bureau; University of Florida, Bureau of Economic and Business Research (BEBR); U.S. Department of Labor, Bureau of Labor Statistics (BLS); Florida Department of Transportation (FDOT)

Travel Behavior of Floridians

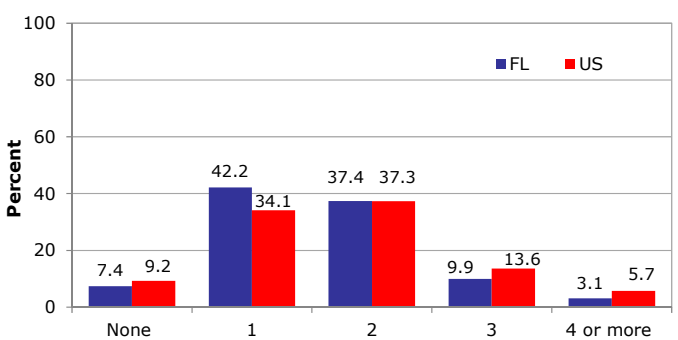
Mode of Travel for Work Commute, 2012



Mean Travel Time to Work



Household Vehicle Availability, 2012



Travel Behavior of Floridians

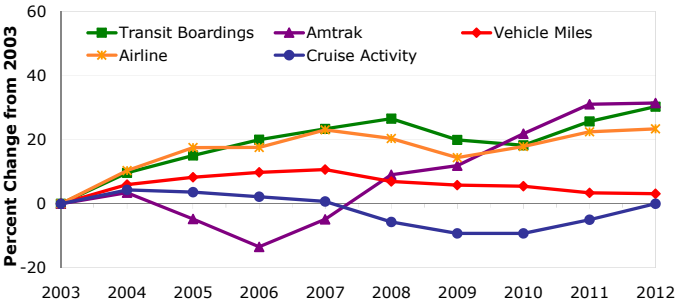
The 2012 American Community Survey found:

- Nearly 90% of Floridians continued to commute to work by automobile, approximately 3% higher than the national average.
- In Florida, transit carried 2.2% of commuter trips, 0.1% higher than in 2011. The national average was 5% for both years.
- Walking increased by 0.1%. It was a less common means of commuting in Florida (1.6%) than nationally (2.8%).
- The work-at-home workforce grew from 4.6% in 2011 to 5% in Florida. The national share also rose slightly to 4.4%.
- Average commute time went up 0.4 minutes for Florida and 0.2 minutes nationally.
- About 33% of Florida households had no workers. The national share was 27.3%.
- Florida households with no cars rose to 7.4% from 7.3% in 2011 and 7% in 2010. The share remained below the national level of 9.2%.

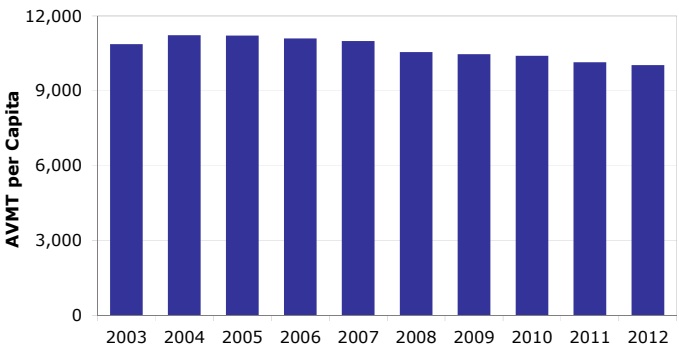
Source: U.S. Census Bureau, *American Community Survey*

Travel Levels

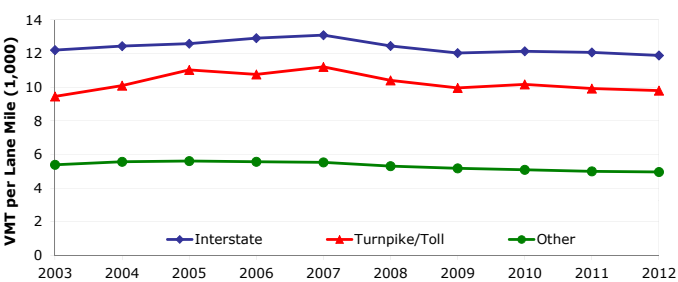
Travel Trends by Mode



Annual Vehicle Miles Traveled (AVMT) per Capita



Average Daily VMT per Lane Mile on the Florida State Highway System



Travel Levels

In 2012:

- Vehicle Miles Traveled (VMT) in Florida decreased by 0.3%. The overall decrease was attributable to depressed economic conditions, reduced freight travel, high fuel prices and travelers choosing other modes or substituting communications for travel.

- VMT per lane mile is an indicator of the intensity of highway use. While it increased through 2007, travel per lane mile on the State Highway System declined from 2008 to 2012.

- Total licensed drivers decreased by 0.9%. Truck, passenger car and motorcycle registrations also went down about 0.7%.

- Fixed route and vanpool transit boardings increased by over 9.5 million unlinked passenger trips (about 3.7%) over 2011.

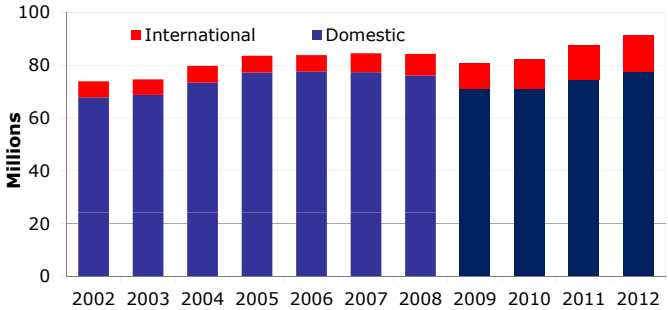
- Both Amtrak ridership and cruise activity increased from 2011 by 0.3% and 3.6%, respectively.

- Florida airports experienced about 69.8 million enplanements, an increase of 0.7% from 2011.

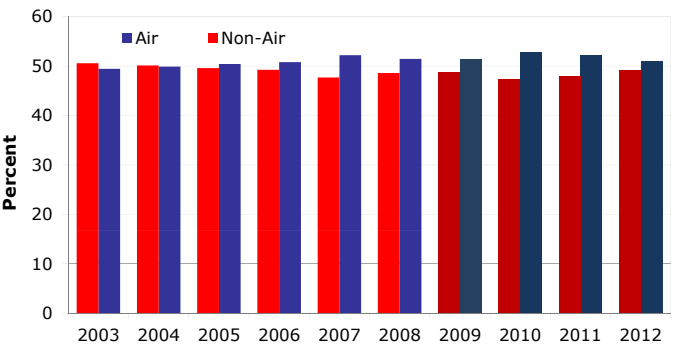
Sources: FDOT; Florida Department of Highway Safety and Motor Vehicles; Amtrak; Florida Ports Council; Federal Aviation Administration; Federal Transit Administration

Tourism and Travel

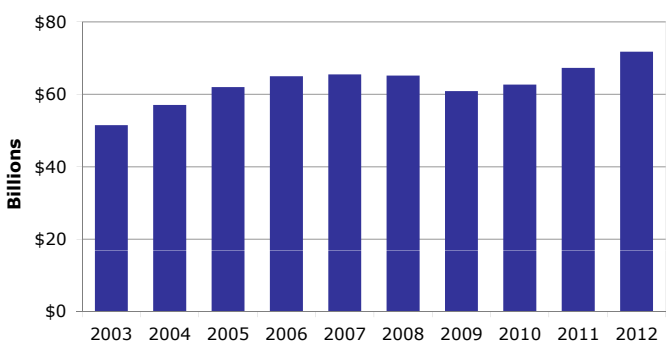
Domestic and International Visitors to Florida



Air/Non-Air Travel for Visitors to Florida



Tourism/Recreation Taxable Sales



Tourism and Travel

In 2012:

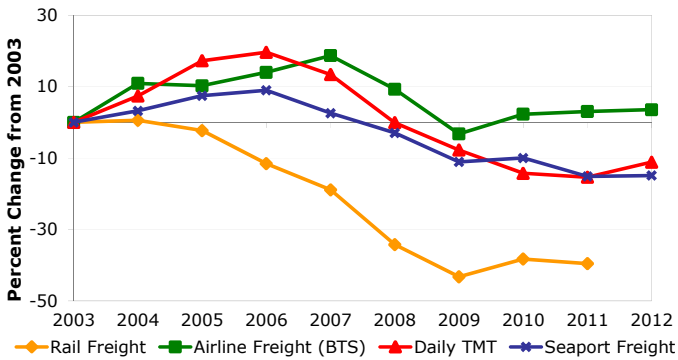
- Florida hosted 91.5 million visitor/tourists, an increase of over 4 million or 4.7% over 2011.
- Domestic visitors to Florida outnumbered international visitors by 5.6 to 1.
- There were approximately 4.7 visitors to the state for every resident.
- Nearly 51% of all visitors to Florida arrived by air.
- Taxable spending in tourism/recreation reached about $71.8 billion, up by over 6.8% from 2011.
- The tourism industry directly employed about 1,058,000 persons, 4.1% more than in 2011.
- There were approximately 14 million cruise revenue passengers in fiscal year (FY) 2012, with:
  - Port Canaveral at over 4 million passengers,
  - Port of Miami and Port Everglades at nearly 3.8 million passengers each.

Sources: VISIT FLORIDA; Florida Ports Council

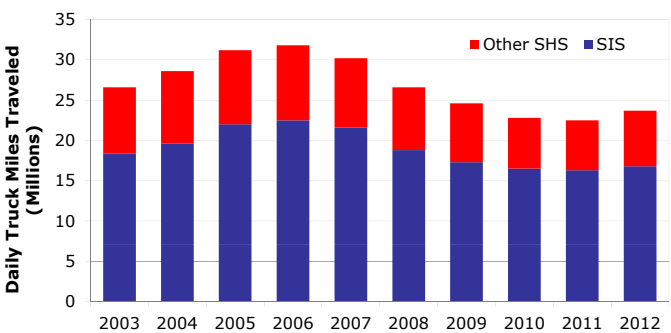
Note: New visitor estimation methodology in 2009; comparisons to pre-2009 are not appropriate.

Freight and Commerce

Freight Growth Trends by Mode



Truck Miles Traveled on the State Highway System



Freight and Commerce

- Nationally, Florida ranks fourth in total air cargo tonnage with nearly 2.4 million tons in 2012. Of the top ten states supporting air cargo volume, Florida's market share accounts for 11%. Miami International Airport dominates with 80% of the market share among all Florida airports.

- After a 5-year decline, truck miles traveled (TMT) on the entire State Highway System increased 5% from 2011. On the Strategic Intermodal System (SIS), TMT increased about 3% and accounted for 10.6% of SIS daily vehicle miles traveled in 2012.

- Waterborne cargo in Florida increased to $85.6 billion in trade value in 2012, a 3.4% increase from 2011.

- Phosphate comprised 40% of total originating rail freight tonnage in 2011. Phosphate rock is used mainly in the production of fertilizers and animal nutrient supplements. Most of the chemicals originated by rail in Florida are fertilizers.

- Rail freight tonnage decreased by 40% from 2003. This could be attributed to the reduction in phosphate shipment and coal freight movement with power plants shifting from coal to natural gas or alternative power sources.

Sources: FDOT; Florida Ports Council; Association of American Railroads; Federal Aviation Administration

Strategic Intermodal System

The following table summarizes the current quantity of facilities on the SIS, as well as the estimated percentage of trips using SIS facilities.

Strategic Intermodal System Facilities		
Facility Type	**SIS**	**Emerging SIS**
Commercial service airports Percent of all Florida enplanements Percent of all Florida air cargo tonnage	7 93% 98%	10 6% 1%
General aviation reliever airports	2	0
Spaceports Percent of all launch activity	2 100%	0 0%
Deepwater seaports Percent of all waterborne freight tonnage Percent of all home-port cruise passengers	7 97% >99%	4 2% <1%
Rail freight terminals Percent of all intermodal rail freight tonnage	5 85%	2 15%
Interregional passenger terminals Percent of all interregional passengers	26 82%	9 7%
Rail corridors Percent of all interregional rail passengers Percent of all freight rail tonnage	1,701 mi 100% >90%	420 mi 0% <10%
Waterways Percent of all waterborne freight on coastal and international shipping routes Percent of all waterborne freight on inland interregional waterways	1,950 mi 100% 55%	312 mi 0% 11%
Highways Percent of vehicle miles traveled on SIS Percent of truck miles traveled on SIS	3,603 mi 54% 70%	762 mi
All Connectors	542	

Note: Data as of October 2013. Includes Planned Add SIS and Planned Add Emerging SIS in the totals.

Strategic Intermodal System

Florida's Strategic Intermodal System:

- Consists of statewide and regionally significant facilities and services - **Strategic**;
- Contains all forms of transportation for moving both people and goods, including linkages for smooth and efficient transfers between modes and major facilities - **Intermodal**; and
- Integrates individual facilities, services, modes of transportation and linkages into a single, integrated transportation network - **System**.

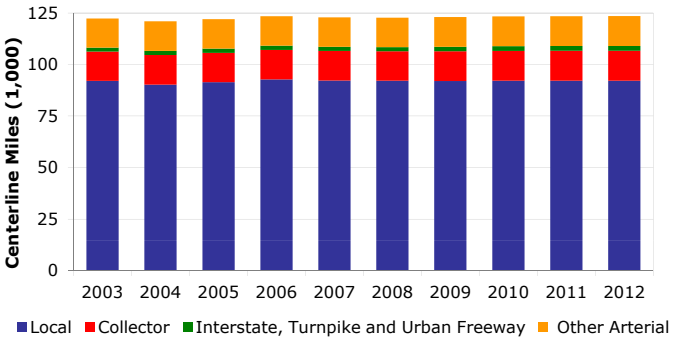
The SIS was established to:

- Efficiently serve the mobility needs of Florida's citizens, businesses and visitors; and
- Help Florida become a worldwide economic leader, enhance economic prosperity and competitiveness, enrich quality of life and reflect responsible environmental stewardship.

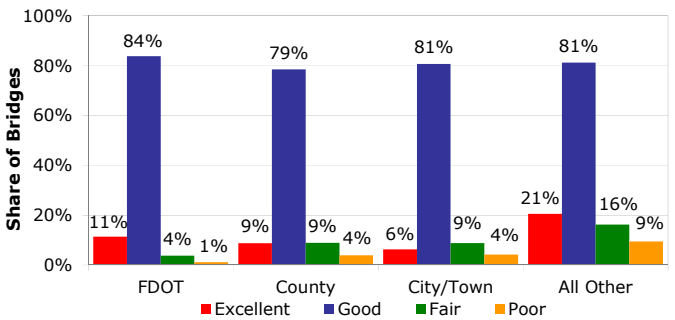
Source: FDOT

Roadway System

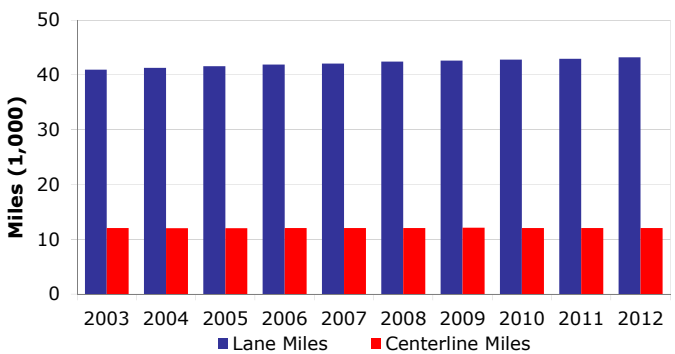
Public Road Length in Florida by Functional Class



FY 2013 Bridge Condition by Maintenance Responsibility



Lane Miles and Centerline Miles on the Florida State Highway System



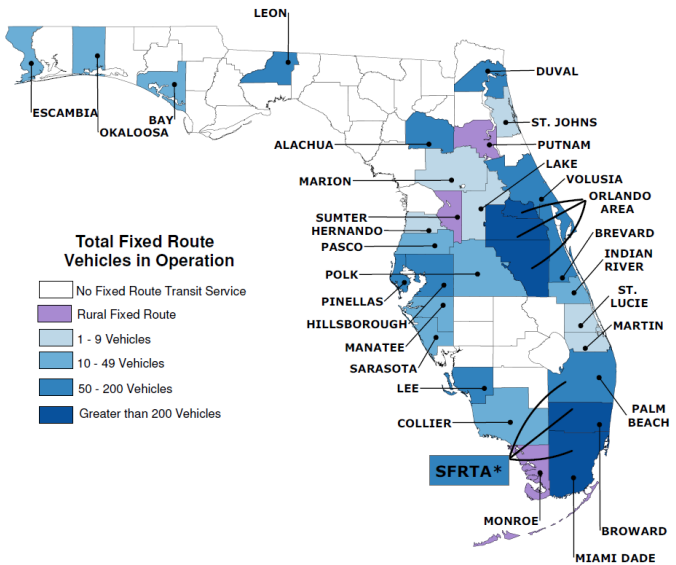
Roadway System

- Florida had 121,829 centerline miles of public roads, up 70 miles from 2011.
- Lane miles on the Florida State Highway System (SHS) grew less than 0.1% since 2011.
- Urban and rural roads functionally classified as "local" comprised approximately 76% of the public road centerline miles.
- Since 2003, Florida has added over 1,450 centerline miles (1.2%) to its roadway system.
- The SHS was less than 10% of the entire Florida roadway network, but it carried over 54% of all daily traffic.
- FDOT maintains around 56% of the 12,059 bridges in Florida while local governments and other organizations are responsible for the rest.
- About 95% (6,379) of the state-maintained bridges are in excellent or good condition.

Sources: FDOT Transportation Statistics Office; FDOT Office of Maintenance; FDOT Office of Comptroller; Florida Department of Revenue.

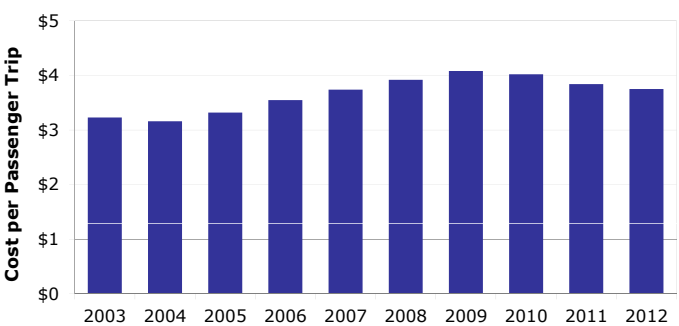
Transit Systems

2012 Fixed Route Vehicles in Operation



*South Florida Regional Transportation Authority
Source: National Transit Database

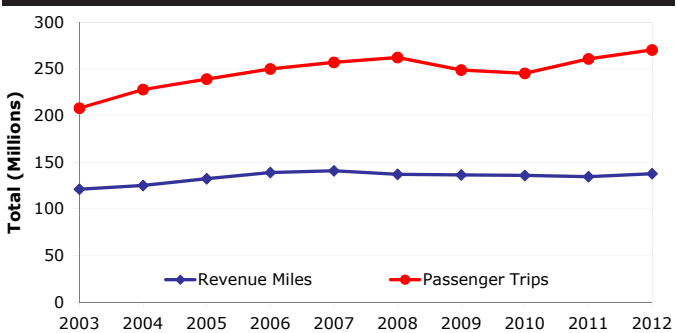
Florida Fixed Route Transit and Vanpool Operating Expense Per Passenger Trip



Transit Systems

- Passenger boardings on fixed route and vanpool services were over 270 million in 2012, an increase of about 3.7% from 2011.
- Revenue miles of transit service increased about 2.3% in 2012. At the same time, the operating expense per passenger trip continued to decrease as transit agencies are becoming more efficient.
- In 2012, Miami-Dade Transit carried 2.6 million more passengers than in 2011. Its ridership was nearly 39% of the statewide total. Other large increases included the Orlando area and Broward County with approximately 1.2 million and 2 million more passengers, respectively.
- Approximately 80% of Florida's population resides within three-quarters of a mile of a transit route.
- Seven Florida vanpool agencies reported over 1.2 million total passenger trips in 2012.

Florida Fixed Route Transit and Vanpool Service



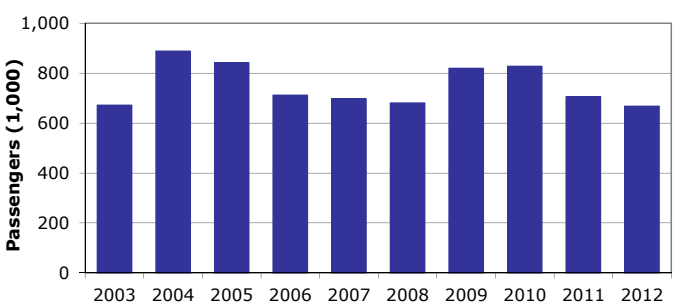
Source: Federal Transit Administration, *National Transit Database (NTD)*

Note: Florida has 32 fixed route agencies: 3 rural and 29 urban. Rural systems are not required to report NTD information.

Transportation Disadvantaged Services

- Florida's Transportation Disadvantaged (TD) Program coordinated and provided over 47.7 million trips, over 3.4 million fewer than in 2011.
- Fixed route transit services provided over 32.9 million TD Program trips.
- Of the trips provided by the TD Program, 36% were for medical purposes, 9% for employment purposes, 20% for education/training, 21% for nutrition, and 14% for other services.
- Florida's residents 60 and older account for 46% of TD trips; children make up 14%; low-income persons, disabled people and low income/disabled account for approximately 12% each; and 4% are in the Other category.
- There were 101,536 unmet TD trip requests, a decrease of 56% from 2011.

Florida Transportation Disadvantaged Services Passenger Totals



Source: Florida Commission for the Transportation Disadvantaged

Pedestrian and Bicycle Services

- The 2012 American Community Survey found walking to work in Florida is less common than in the nation. In the past decade, about 1.6% of the commuters have walked to work in Florida. Nationally, 2.7% have done so.

- Nearly 865,000 U.S. commuters reported biking as their primary mode of travel to work, a 9% increase from 2011.

- Broward County (only county in the U.S.) and Miami Beach are among the 49 U.S. municipal areas with bike sharing programs. Gainesville, Orlando, Tampa and Miami plan to join soon. Nationally, 29 programs are offered in higher education institutions. The University of South Florida was the only institution in the state offering the program in 2012.

- Bikes-on-bus usage has generally grown in Florida. Since 2008, PSTA and HART have had fluctuating trends while Space Coast and StarMetro have experienced a growth of 88% and 29%, respectively.

Florida Monthly Bikes on Bus Boardings

Agency	2008	2009	2010	2011	2012
PSTA, Pinellas	33,007	29,454	31,104	27,557	32,087
HART, Hillsborough	20,663	17,925	18,213	19,354	18,880
Space Coast, Brevard	8,081	10,176	11,480	13,545	15,166
StarMetro,Tallahassee	2,227	2,209	2,196	2,325	2,877

Sources: FDOT; U.S. Census Bureau; The Pedestrian and Bicycle Information Center; individual transit agencies

Note: Photo credit to Deco Bike LLC

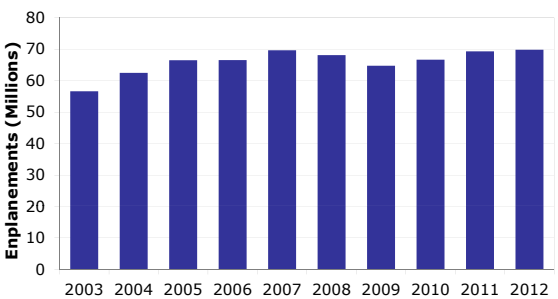
Airports

- Out of 779 facilities, Florida has 19 Commercial Service and 110 General Aviation public use airports, which host more than 14,000 based aircraft*. Florida is the only state with four large hubs and leads the world in pilot training.

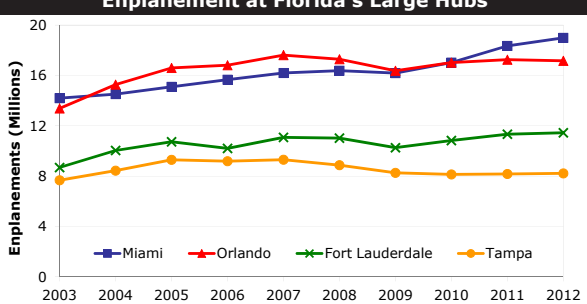
- Air travel plays an important role in Florida's tourism. Over 50% of the tourists arrive by air.

- Over the past 20 years, passenger enplanements have grown an average of 2.9% per year. About 80% of all enplanements took place at the four large hubs.

Florida Total Enplanements



Enplanement at Florida's Large Hubs



Sources: FDOT Aviation Office; Federal Aviation Administration; Visit Florida

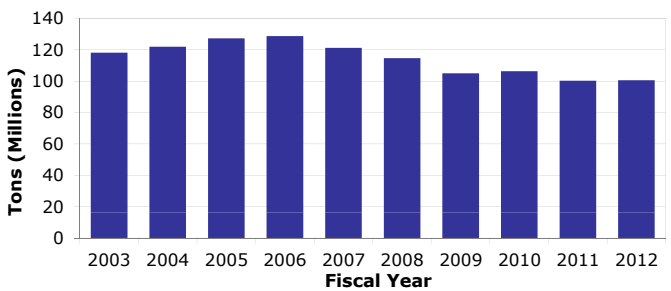
*An aircraft permanently stationed at an airport, usually by agreement between the aircraft owner and airport management.

Seaports

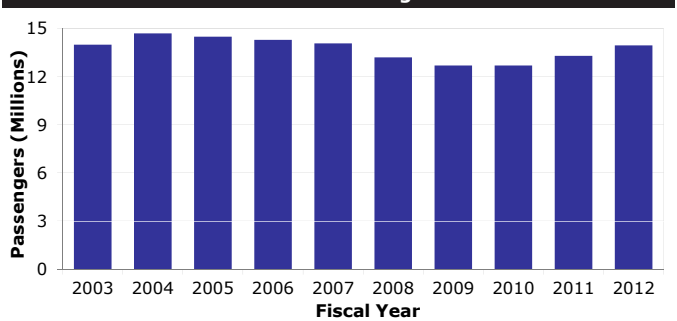
In 2012:

- Florida's 15 deepwater seaports moved 100.6 million tons of cargo and handled nearly 3.1 million 20-ft equivalent container units.
- Florida's total waterborne cargo value increased by 3.5%, container movements by 2.3% and waterborne tonnage by 0.3% over 2011.
- Florida's seven cruise ports carried nearly 14 million passengers, 3.6% more than in 2011. Multi-day cruises accounted for approximately 13.6 million passengers, an increase of 4.5%, whereas one-day cruises declined by 21%.

Tonnage at Florida's Seaports



Florida Cruise Passenger Totals

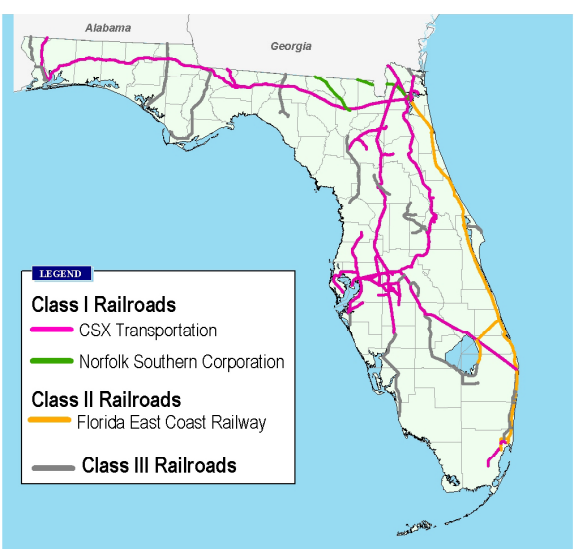


Sources: Florida Ports Council; FDOT

Rail System

- Of the 2,793 miles of rail lines in Florida, all but 143 miles are owned by 15 freight railroads, and the entire track is controlled by them.
- According to the Federal Railroad Administration, there were 3,795 public at-grade rail crossings in Florida as of October 2013, which presented both safety and mobility challenges.
- In 2011, Florida's freight railroads moved nearly 104.6 million tons of freight.
- In 2011, Florida originated 754,800 rail carloads, a 1.2% increase from 2010 and terminated 1,164,700 carloads, a 0.8% decrease. Florida ranked 13th and 9th among states, respectively, for originating and terminating tonnage.

Florida Rail Lines



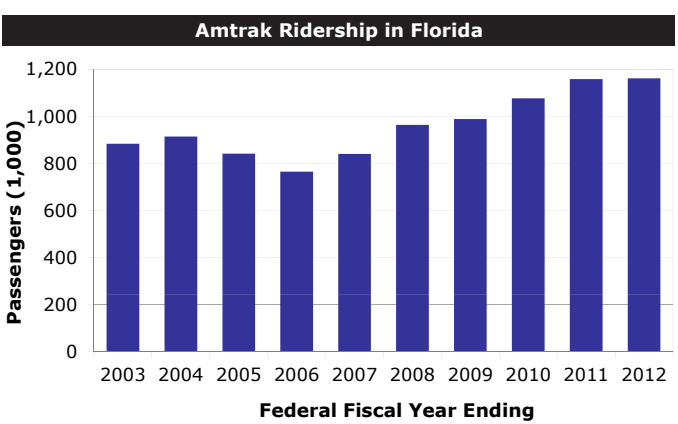
Rail System

- In FY 2012, the Auto Train carried nearly 264,000 passengers, removing over 130,000 vehicles from highways connecting Florida with the Mid-Atlantic. Amtrak ridership in Florida has increased for six consecutive years, 51.9 percent above the 2006 level.

- Amtrak employed 774 Florida residents in 2012 and operated service on almost 500 route miles in Florida.

- In Fort Lauderdale, funding has been secured for the initial 1.4 miles of a planned 2.7 mile streetcar known as The Wave. It is anticipated to be in operation by 2016.

- In South Florida, Florida East Coast Industries plans to operate a privately owned intercity passenger rail service from Miami to Orlando known as All Aboard Florida. Its proposed start date is 2015.

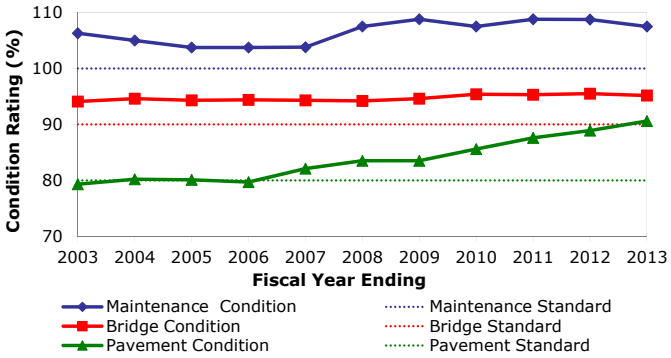


Sources: FDOT Rail Office; Amtrak; Association of American Railroads; Federal Railroad Administration

Note: Existing urban rail transit services are included in the transit pages of the pocket guide.

System Performance

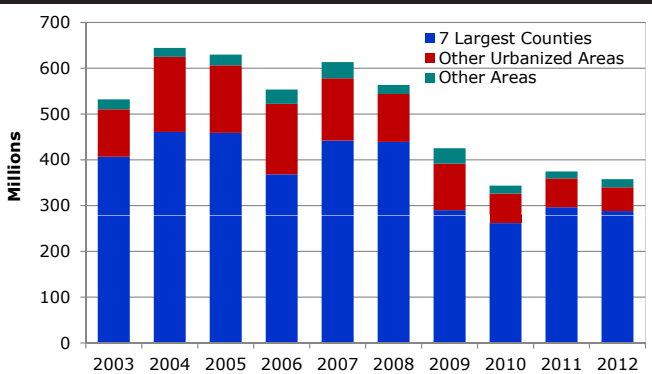
Highway System Condition Ratings



Florida Department of Transportation Contracting Activity, State Highway System Including Turnpike

	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013
Lane Miles for Resurfacing	2,894	3,072	2,792	2,550	2,491
Lane Miles for Highway Capacity Improvements	229	177	307	250	295
Bridges to Be Repaired	92	131	120	113	153
Bridges to Be Replaced	23	24	14	18	24

Annual Person Hours of Delay on SHS by Area



System Performance

FDOT is committed to ensuring the performance and safety (see pages 28-29) of the State Highway System (SHS). For more on FDOT's performance story, please visit fdotperforms.org.

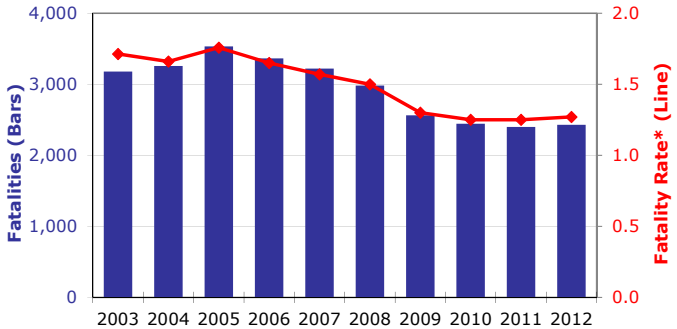
- SHS condition ratings continue to exceed bridge, pavement and maintenance standards set by the state legislature.
- In FY 2013, FDOT contracted for 74 lane miles of capacity improvements, 1,982 lane miles of SHS resurfacing, and 112 bridge repairs and replacements.
- Person hours of delay on the SHS started to level off after a sharp drop in 2009. In 2012, more than 80% of the delay occurred in the seven largest counties.
- Over the past decade, the share of annual hours severely congested has increased in the seven largest counties, from 79% in 2003 to 84% in 2012 and decreased in other urbanized areas (18% in 2003 vs. 13% in 2012).

Source: FDOT

Note: Bridge photo credit to ©Alan S. Maltz/alanmaltz.com

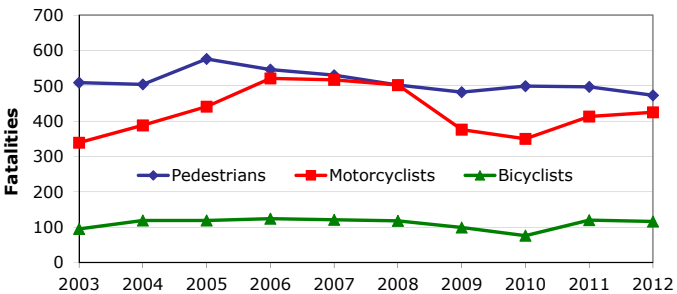
Transportation Safety

Total Florida Traffic Fatalities and Fatality Rate

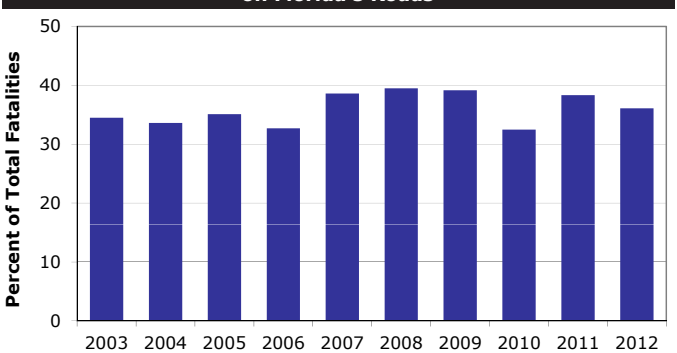


* Per 100 million vehicle miles traveled

Florida Bicyclist, Motorcyclist and Pedestrian Traffic Fatalities



Alchohol-Related Share of Deaths on Florida's Roads



Transportation Safety

When compared with 2011, in 2012:

- Total traffic fatalities in the U.S. increased by 5.3% to 34,080, reversing a six-year trend of decline.
- In Florida, traffic fatalities went up slightly by 1.3% to 2,430, following a six-year decline. Florida's fatality rate also grew slightly to 1.27 fatalities per 100 million vehicle miles.
- Of Florida's 2,430 traffic deaths, 42% were bicyclists, pedestrians, and motorcyclists. Florida's Strategic Highway Safety Plan includes strategies to reduce the number of Vulnerable Road User fatalities.
- Pedestrian and bicyclist fatalities decreased by 4.8% and 3.3%, respectively, but motorcyclist fatalities increased by 2.9%, with a 15.8% drop in motorcycle passenger deaths.

- Alcohol-related casualties decreased by 4.7% from 920 to 877, accounting for 36.1% of the total traffic deaths.
- Fatalities of teen drivers and passengers saw a significant decrease of 18.8% from 154 to 125.

Sources: FDOT; Florida Department of Highway Safety and Motor Vehicles; National Highway Traffic Safety Administration

Transportation and the Environment

Consistent with the goals of MAP-21* and Florida's Vision for the 21st Century, FDOT continues to develop and implement approaches in environmental review and analysis which support expedited project delivery.

The FDOT Sociocultural Effects Evaluation program is working toward better clarifying the best ways to evaluate the potential effects of transportation decisions on people and their communities, with respect to social issues, mobility, the economy, land use, aesthetic effects, and the potential for acquisition and relocation.

The Federal Highway Administration has approved FDOT's new carbon monoxide screening model for use in federally eligible projects to replace the 2004 screening model. The new model incorporates new EPA emission factors and more geometric intersection types, and adds a tollbooth option.

The Department has updated its inventory and evaluation of the historic highway bridges in Florida. This effort involved the evaluation of over 4,000 bridges and resulted in the identification of 166 significant historic structures.

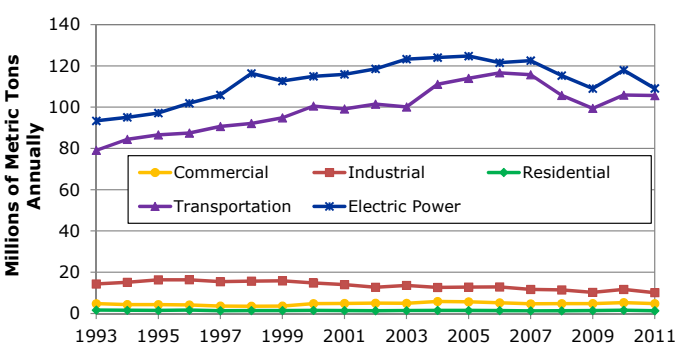
* MAP-21 - Moving Ahead for Progress in the 21st Century Act

Transportation and the Environment

To minimize the impact on nesting sea turtles and other protected wildlife species and implement more effective protection measures, FDOT sponsored research on State Road 30E in Northwest Florida, which provided baseline information on the dynamic environmental conditions in the area and the distribution of nesting sea turtles.

Under the Florida Watershed Restoration Act, restoration efforts are being undertaken through the Total Maximum Daily Loads and Basin Management Action Planning programs. Close coordination between FDOT, the Florida Department of Environmental Protection and other state agencies is leading to promising innovative water quality restoration solutions for impaired water throughout Florida.

Florida Fossil Fuel CO_2 Emissions by Sector

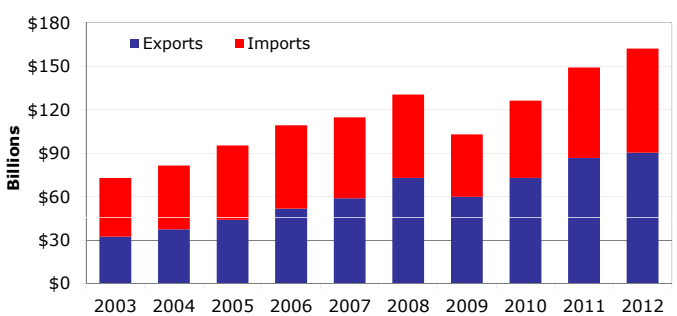


Sources: FDOT; U.S. Environmental Protection Agency (EPA); U.S. Energy Information Administration

Transportation and the Economy

- Economic competitiveness depends on providing superior transportation services to all categories of users – residents, shippers, tourists and business travelers.
- The SIS is designed to provide multimodal services between Florida's diverse regions and to global markets, thus enhancing competitiveness and growth.
- Florida's international trade rose to over $162 billion in 2012, an 8.7% increase from 2011 to reach an all-time high.
- As the sixth-largest export state in the U.S., Florida exported goods and services worth $90 billion in 2012. Exports exceeded imports by almost $20 billion.

Florida International Trade

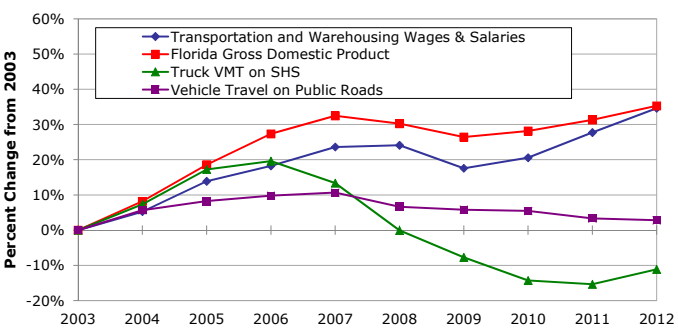


Transportation and the Economy

- Vehicle miles traveled on the public road system continued downward through 2012, with a decline of 0.3% between 2011 and 2012.
- Truck miles traveled (TMT) on the State Highway System (SHS) declined from 2007 through 2011, but experienced an increase in 2012. In 2012, TMT constituted 8.3% of vehicle mileage on SHS.

- Compensation for Transportation and Warehousing industries saw a gain of over 5.4% in 2012, reaching a new record.
- Employment in Transportation and Material Moving Occupations, which includes most direct transportation workers, accounts for 5.8% of total employment in Florida. In 2012, the industry employed an estimated 423,830 workers, up from 405,270 in 2011.

Trends in Travel and Economic Activities

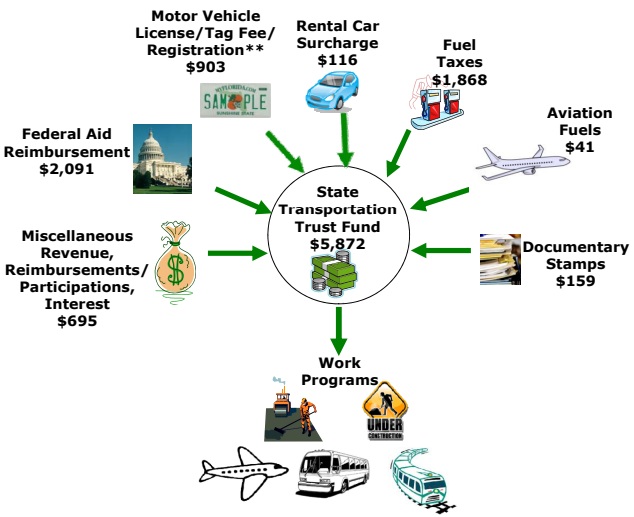


Sources: U.S. Bureau of Labor Statistics; U.S. Bureau of Economic Analysis; FDOT; Enterprise Florida

Transportation Resources

The public and businesses spend resources on transportation both directly and indirectly. Public resources, comprising the state's investment in transportation, come from a variety of sources as depicted in the graphic below.

State Transportation Trust Fund Receipts (Millions)
FY 2012 - 2013



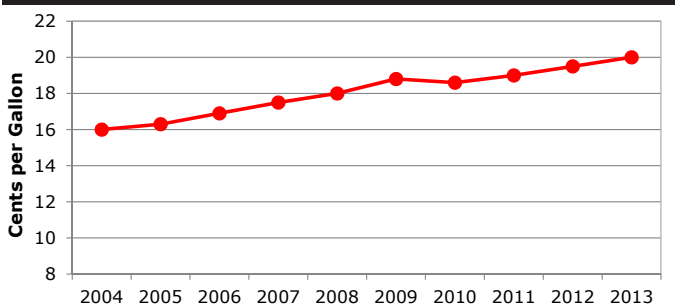
Notes: *The subtotals do not add up due to rounding.
**This revenue includes $194 million from $47 title fee revenue transferred to the General Revenue Fund per Chapter 2012-128, L.O.F.

Florida's transportation revenues include fuel taxes and other fees that support local, state and federal transportation spending. Total fuel tax rates include federal and state fuel taxes, the State Comprehensive Enhanced Transportation System (SCETS) tax and local fuel taxes.

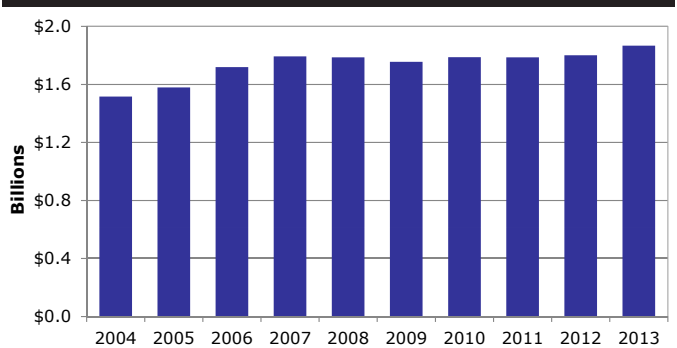
Transportation Resources

- In Florida, the fuel sales and the SCETS taxes are indexed to the general rate of inflation on January 1 of each year.
- The combined state fuel sales and SCETS tax rates were adjusted from 16 cents per gallon in 2004 to 20 cents per gallon in 2013.
- After a drop in 2008, the fuel tax component of the State Transportation Trust Fund resumed growth, exceeding $1.8 billion in FY 2012 and FY 2013.

Florida's Annual State Fuel Tax



Fuel Tax Component of State Transportation Trust Fund Revenue Trend



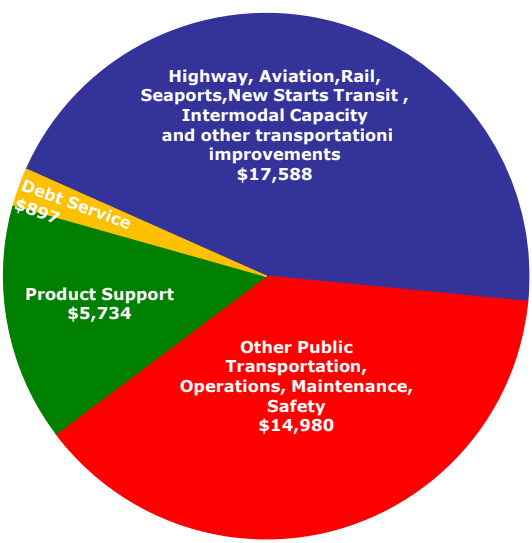
Source: FDOT Office of Comptroller

Transportation Funding

State and federal resources for transportation are used to fund FDOT's Five-Year Work Program. The program is complemented with local government, business, and private investments in transportation vehicles, facilities and services. They collectively fund the overall transportation system.

The 2014-2018 work program increased 7% or $2.6 billion from the 2013-2017 program. The majority of the increase is due to the additional revenue directed to the State Transportation Trust Fund as a result of Senate Bill 1998 signed into law in 2012.

Five-Year Work Program Allocations (Millions)
FY 2014-2018



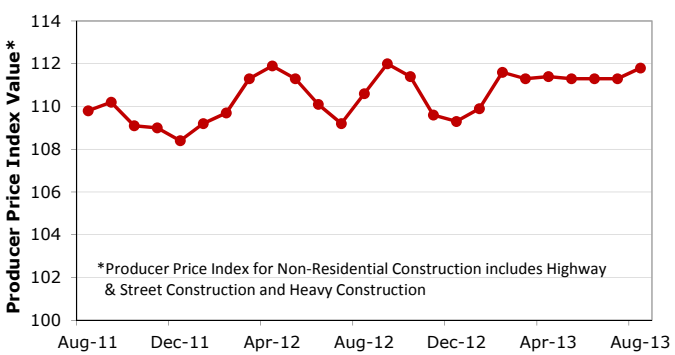
Total 5 - Year Adopted Work Program $39,199M

Source: FDOT Office of Work Program & Budget

Transportation Costs

- Construction costs rose about 5% during the past two years.
- After moderate fluctuations in 2012, cost level estimates hit a plateau for much of 2013.
- Total construction employment, including many transportation construction workers, showed an increase of about 8% over the past two years.
- Transportation construction costs are influenced by automation, construction industry capacity, and costs of major inputs, including labor, materials and fuel.

PPI for Highway and Non-Residential Construction



Source: U.S. Department of Labor, Bureau of Labor Statistics

Florida Fast Facts

General

19.1	million people - 4th most populous state
	• 87.5% living in urban areas
	• 18.2% over age 65
91.5	million annual visitors
53,625	square miles of land – 26th largest

Transportation System:

121,829	centerline miles of public roads
12,079	centerline miles of State Highway System
43,212	lane miles of State Highway System
653	centerline miles of toll facilities
2,989	lane miles of toll facilities
12,059	bridges, 6,703 maintained by the state
29	urban fixed route transit agencies
3	rural fixed route transit agencies
436	transportation disadvantaged operators
15	seaports, 7 with cruises
779	airports
	• 129 public use
	• 650 private use
15	railroads
	• 2,793 miles of rail lines
	• 3,795 public at-grade crossings
	• 2 Amtrak routes – 18 stations
14	million registered vehicles

System Usage:

191,374	million annual vehicle miles of travel
70	million enplanements
270	million transit trips
48	million transportation disadvantaged trips
14	million cruise passengers
774	million tons of freight traffic*

Note: *2011 Data

Links

Florida Transportation Plan
www.dot.state.fl.us/planning/ftp

Florida Transportation Performance
www.fdotperforms.org

Florida Transportation Trends and Conditions
www.dot.state.fl.us/planning/trends

Florida's Transportation System by the Numbers
www.dot.state.fl.us/intermodal/system

FDOT Transportation Statistics Office
www.dot.state.fl.us/planning/statistics

Florida Transportation Indicators
www.floridatransportationindicators.org

Florida Ports Council
www.flaports.org

Florida Aviation Data and Forecasts
www.dot.state.fl.us/aviation/dataforecasts.shtm

For further information:
Phone: (850) 414-4800
E-mail: planning@dot.state.fl.us

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